



THE CITY OF SAN DIEGO

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Summary of Procedures for the Consultant Rotation List

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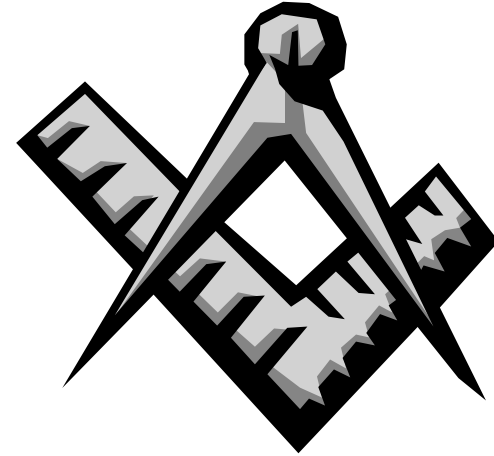
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Summary of Procedures for the Consultant Rotation List

CITY, COUNTY, AND PORT OF
SAN DIEGO



FOR ARCHITECTURE AND ENGINEERING CONSULTANTS

The joint City of San Diego (City), County of San Diego (County), and Port of San Diego (Port) consultant needs for licensed architectural, engineering (A&E) and related services are met through: 1) the use of the Consultant Rotation List, and 2) advertising for specific projects in local newspapers, the internet, and other media. The City of San Diego administers the Consultant Rotation List for architecture and engineering consultants. This list is used by City, County and Port departments when consultants are needed for projects as they occur. Once consulting firms are pre-qualified, they are placed on this list to be used by all three agencies. The City is providing this publication to explain how the Consultant Rotation List works. We hope it will serve to answer some often asked questions.



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Consultant Rotation List is established at the beginning of each calendar year and are used throughout the year, or until they are terminated or superseded by a replacement list. The Consultant Rotation List is used for:

- Projects selected by the County and Port;and
- Projects that are included in the City’s Capital Improvement Program (CIP).

The Consultant Rotation disciplines for which lists are typically established are as follows:

- Airport Engineering Services
- Architecture
- Construction Administration Services
- Electrical Engineering
- Environmental: Biological
- Environmental: Cultural Resources
- Environmental: General EIR/EIS
- Environmental: Hazardous Materials
- General Civil Engineering
- Geotechnical
- Landscape Architecture
- Marine Engineering
- Mechanical Engineering
- Planning Services
- Project Management - Staff Extension
- Storm Water and Erosion Control Design
- Structural Engineering
- Subsurface Utility Engineering (SUE)
- Surveying
- Traffic Engineering



Distribution of Work - 10 Points Maximum

Distribution of Work: This criteria is completed by the Consultant Services Coordinator according to the following scale:

City of San Diego Consultant Rotation List Distribution of Work Criteria

Fee Range: Less than \$250,000	
<u>Total Value of City Contracts</u>	<u>Points</u>
Less than \$250,000	10
\$250,000 to \$500,000	5
More than \$500,000	2

Consultant Rotation List Criteria



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Local Environment - 10 Points Maximum

Local Environment/Familiarity: (5 Points) The firm is familiar with the City/County/Port and other local regulatory agencies, planning, and civic groups. The environment includes, but is not limited to, City and other local agencies' regulations and policies and other technical criteria. The firm should explain how they plan to deal with the distance issue if located outside San Diego County.

Sliding Scale (0 to 5 Points)

- (5 pts) Firm is very familiar with County/City/Port and other local regulatory agencies, planning and civic groups. Would be able to compensate for distance if located outside San Diego County.
- (0 pts) Unfamiliar with County/City/Port and local regulatory agencies, planning and civic groups.

City/County/Port Work: (5 Points) The firm has had previous projects with the City, County, and Port. If prior projects are relevant to the specific project, they should be weighed more heavily.

Where will you find this information? (SOQ Questionnaire, page 2, "City, County, Port Contracts"; SF254 No. 11, SF255 No. 8)

Sliding Scale (0 to 5 Points)

- (5 pts) Very Highly Qualified, Outstanding
- (0 pts) Extremely Unsatisfactory, Unacceptable

Summary of Procedures for the Consultant Rotation List

- Water/Wastewater Facilities
- Water/Wastewater Pump Stations

NOTES:

- A. Disciplines are determined each year based on input from participating agencies.
- B. In the pursuit of 1) increasing the pool of qualified consultants; and 2) allowing smaller firms to effectively compete, two lists for each of the disciplines are created. The first list is a "small" list for projects with consultant fees of \$100,000 or less, and the second is a "large" list, established for projects with consultant fees between \$100,001 and \$250,000. If there are not enough firms for two lists, then a combined list is created.

Procedures for establishing the Consultant Rotation List:

- Advertisements are placed in the San Diego Daily Transcript and other local newspapers as well as the City of San Diego web site (www.sandiego.gov) requesting Statement of Qualifications (SOQs) and other relevant information from A&E firms.
- If a significant number of consultants apply, the Consultant Nominating Committee (CNC), based upon set criteria, reviews and evaluates the SOQs. Members of the CNC are volunteers from the industry.
- When the SOQs for a given discipline are of an insufficient number and an evaluation by the CNC is unwarranted, the list shall be certified by the Consultant Services Coordinator (CSC).

Procedures for selecting firms from the Consultant Rotation List:

1. At the discretion of the initiating department, and if the estimated consultant fee for the project is within the Consultant Rotation limits, the project manager requests, via memo to the CSC, a number of certified firms to interview from the appropriate Consultant Rotation List.
2. Each firm on the Consultant Rotation List shall be given **ONE** opportunity throughout the use of the list to pass on a project without being rotated to the bottom of the list. Firms accepting an interview shall be rotated to the bottom of the list.
3. The office of the CSC calls the next firm's project manager to see if the firm is interested in interviewing for the project. If the firm does not respond to the CSC by a reasonable date, the firm will be given an automatic pass and will rotate to the bottom of the list. Once the prerequisite number of firms have accepted the interview, the process is completed for that project. The list of the firms are sent to the City, County, or Port project manager.
4. In the event that all firms on the Consultant Rotation List pass on a project, the names of the prerequisite number of firms at the top of the rotation shall be given to the initiating department regardless of their initial intent to pass on the project.
5. When a firm has been contacted and has agreed to an interview, a letter is sent to the firm, which will include the following information:
 - Estimated dollar amount of the agreement;
 - An approximate date by which the project manager

appropriate for the specific project. Technical and non-technical staff should be licensed by the State or technical institutes in the various disciplines required to complete the project. The firm's experience should reflect municipal work, construction administration, and/or design of similar projects.

Where will you find this information? (SF255 Nos. 4 & 7, Letter of Interest)

Sliding Scale (0 to 30 Points)

(30 pts)	Very Highly Qualified, Outstanding
(15 pts)	Average
(0 pts)	Extremely Unsatisfactory, Unacceptable

Capacity - 10 Points Maximum

Capacity: Capacity to accomplish the work in the required time.

Where will you find this information? (SF255 Nos. 4 & 10, SOQ Questionnaire, page 3, "Other Resources")

Sliding Scale (0 to 10 Points)

(10 pts)	Very Highly Qualified, Outstanding
(5 pts)	Average
(0 pts)	Extremely Unsatisfactory, Unacceptable

Rating the Consultants

The **CNC members** shall score the evaluation categories based on the following comparative guidelines.

NOTE: Scoring criteria with sliding scales include recommended benchmarks for levels of competence. However, any point total within the scoring range may be assigned to the consultant.

Experience: 40 Points Maximum

Specialized Experience: Expertise in design of City and other municipal and private projects of this type. Experience should be relevant to the type of project being considered.

Where will you find this information? (SF254 Nos. 10 & 11; SF255 Nos. 8 & 10; SOQ Questionnaire, page 2, "Project Reference Summaries"- (Consultant Rotation Lists Only))

Sliding Scale (0 to 40 Points)

(40 pts)	Very Highly Qualified, Outstanding
(20 pts)	Average
(0 pts)	Extremely Unsatisfactory, Unacceptable

Personnel: 30 Points Maximum

Personnel: The firm identifies and lists qualifications of all proposed subconsultants. The firm's staff and all subconsultant teams should be experienced at a level

will contact the firm;

- Scope of work as provided by the project manager.

6. Final selections are made according to individual agency protocols.

Projects that are over \$250,000 or have very specific requirements that cannot be met through the Rotation List are advertised. The City, County and Port will advertise for these consultants independently of each other, rather than as a joint body.



Preselection Criteria

In the interest of establishing a uniform pre-selection criteria, which is to be used by the City's CNC members, the City of San Diego's Office of the City Manager, Equal Opportunity Contracting (EOC), has created the following guidelines:

EQUAL OPPORTUNITY COMPLIANCE

It is the policy of the City of San Diego to encourage equal opportunity in its professional services contracts. Toward this end, proposals from small businesses, disabled owned businesses, women owned businesses, firms owned by African-Americans, Native Americans, Asian-Americans, Filipinos, and Latinos, and local firms are strongly encouraged. Other Prime Consultants are encouraged to subconsult or joint venture with these firms. The City endeavors to do business with firms sharing the City's commitment to equal opportunity and will not do business with any firm that discriminates on the basis of race, religion, color, ancestry, age, gender, sexual orientation, disability, medical condition or place of birth.



Project Rating Criteria

The criteria for rating the Statements of Qualification submitted by consultants is divided into two categories: the criteria for Consultant Rotation List and the criteria for Project Specific.

Consultant Rotation List is established at the beginning of each calendar year and are used throughout the year, or until they are terminated or superseded by a new list.

Consultant Rotation List	
Experience	40 pts
Personnel	30 pts
Capacity	10 pts
Local Environment	10 pts
Distribution of Work*	10 pts
Total	100 pts

*Distribution of Work is awarded by the Consultant Services Coordinator